



## Document Attachments



# Table of Contents

<b>Document Attachments</b> .....	i
<b>Document Attachments</b> .....	1



# Document Attachments

The Document Attachments feature allows you to upload and view documents by application, school year, folder, and document type. **This feature is not available in all districts.**

If you are logged on as a user assigned to a Document Attachments-enabled role, the **Documents** button is displayed on various pages in the TxEIS Business system. If a document is attached, the **Documents** button displays a note icon.

If you have full access, you can upload and download files. If you have read-only access, you can download existing files, but you cannot upload files.

If you are logged on with a role that does *not* have security access to Document Attachments, the **Documents** button is *not* displayed on any pages.

## Document Attachment-enabled pages

Application	Menu	Folder	Document Type
Accounts Receivable	Tables > Customer Information	Customers	Other
Accounts Receivable	Maintenance > Create/Modify Invoice	Invoices	Invoices
Accounts Receivable	Maintenance > Invoice Approval	Invoices	Invoices
Accounts Receivable	Maintenance > Invoice Voids/Adjustments (read-only)	Invoices	Invoices
Accounts Receivable	Maintenance > Invoice Inquiry/Customer Notes > Inquiry	Invoices	Invoices
Accounts Receivable	Maintenance > Invoice Status Inquiry (read-only)	Invoices	Invoices
Asset Management	Maintenance > Inventory Maintenance	Asset	Other, Warranty
Bank Reconciliation	Maintenance > Bank Reconciliation	Reconciliation	Reconciliation
Finance	Maintenance > Vendor Information	Vendor	Bid Contract Other Quote Setup Form Sole Source W-9
		Vendor Catalog	Catalog
Finance	Maintenance > Postings > Journal Budget	Journal Entry	Journal Entry
Finance	Maintenance > Postings > Journal Inquiry	Journal Entry	Journal Entry
Finance	Maintenance > Postings > Purchase Order	Encumbrances	Encumbrances

<b>Application</b>	<b>Menu</b>	<b>Folder</b>	<b>Document Type</b>
Finance	Maintenance > Postings > Cash Receipt	Cash Receipt	Cash Receipt
Finance	Maintenance > Postings > Credit Memo	Invoices	Invoices
Finance	Maintenance > Postings > Check Processing - PA	Invoices	Invoices
Finance	Maintenance > Postings > Check Processing - PO	Invoices	Invoices
Finance	Maintenance > Postings > Journal Actual	Journal Entry	Journal Entry
Finance	Maintenance > Pending Payables	Purchasing - Requisition Finance - Invoices	Purchasing - Receiving Finance - Invoices
Finance	Maintenance > Credit Card > Posting - PA	Invoices	Invoices
Finance	Maintenance > Credit Card > Posting - PO	Invoices	Invoices
Finance	Inquiry > GL Inquiry > GL Inquiry (read-only)	Accounts Receivable - Invoices Finance - Journal Entry Finance - Encumbrances Finance - Cash Receipt Finance - Invoices Purchasing - Requisition	Accounts Receivable - Invoices Finance - Journal Entry Finance - Encumbrances Finance - Cash Receipt Finance - Invoices Purchasing - Receiving
Finance	Inquiry > Vendor Inquiry > Vendor PO Inquiry (read-only)	Encumbrances	Encumbrances
Finance	Inquiry > Vendor Inquiry > Vendor Payment Inquiry (read-only)	Invoices	Invoices
Finance	Inquiry > Travel Reimbursement Inquiry (read-only)	TRVL	Other
Finance	Budget Amendment > Budget Amendment Maintenance	BAR	Other
Finance	Budget Amendment > Approve Budget Amendment	BAR	Other
Finance	Budget Amendment > Budget Amendment Inquiry (read-only)	BAR	Other
Grants and Projects	Maintenance > Member Grants > Grant Maintenance	NOGA	Other
Grants and Projects	Maintenance > Member Grants > Object Maintenance	NOGA	Other
Grants and Projects	Maintenance > Approval Dashboard	Budget Reimburse	Other Other

Application	Menu	Folder	Document Type
Personnel	Maintenance > Staff Demo > Demographic Information	Demographic	Application, Driver License, I-9, Other, Resume, SSN Card
Personnel	Maintenance > Staff Demo > Credentials	Credentials	Certification, Education
Personnel	Maintenance > Staff Demo > Verification	Verification	Contract, Signed Agreement
Personnel	Maintenance > Staff Demo > Service Record	Service Record	Service Record
Payroll	Maintenance > Staff Job/Pay Data	Payroll	Deduction, Other, W-4
Payroll	Maintenance > Leave Account Transaction > Staff Leave Maint	Leave	Leave
Payroll	Maintenance > Leave Account Transaction > Leave Adjustment	Leave	Leave
Payroll	Maintenance > Leave Account Transaction > Employee Substitute	Leave	Leave
Purchasing	Maintenance > Vendor Order Addresses (read-only)	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Create/Modify Requisition Vendor Directory (read-only)	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Create/Modify Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Create/Modify Contract Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Approve Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Bundle Requisitions (read-only)	Requisition	Supporting Forms, Vendor Documents
Purchasing	Maintenance > Receiving	Receiving	Receiving Invoice
Purchasing	Inquiry > Requisition Status Inquiry	Requisition	Supporting Forms, Vendor Documents
Purchasing	Inquiry > Contract Requisition Status Inquiry	Requisition	Supporting Forms, Vendor Documents
Purchasing	Next Year > Maintenance > Create/Modify Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Next Year > Maintenance > Create/Modify Contract Requisition	Requisition	Supporting Forms, Vendor Documents
Purchasing	Next Year > Maintenance > Approve Requisition	Requisition	Supporting Forms, Vendor Documents
Warehouse	Maintenance > Inventory Maintenance	Items	Other

### List of permissible file types

File Extension	Document Type
.doc	application/msword
.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document

File Extension	Document Type
.gif	image/gif
.jpeg	image/jpeg
.jpg	image/jpeg
.pdf	application/pdf
.png	image/png
.pps	application/vnd.ms-powerpoint
.ppt	application/vnd.ms-powerpoint
.pptx	application/vnd.openxmlformats-officedocument.presentationml.presentation
.tif	image/tiff
.tiff	image/tiff
.txt	text/plain
.xls	application/vnd.ms-excel
.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

## Upload or view documents:

Under **Document List**:

Field	Description
<b>Application</b>	The application you are currently logged on to is displayed (e.g., Finance).
<b>Folder</b>	Select the folder for which you want to view or attach a document. Different types of documents must be uploaded to specific folders. Changing the folder will change the document type options in the <b>Select Type</b> field.
<b>Select School Year</b>	Select the school year for which you want to view documents. Student documents are stored by year.


Existing documents are displayed according to specified criteria.

Under **Document Upload**:

Field	Description
<b>Select File to Upload</b>	Click <b>Choose File</b> . Locate and select the document on your computer or network. The file name is displayed next to <b>Choose File</b> .
<b>Select Type</b>	Select the type of document you are uploading. The list varies according to your selection in the Folder field.
<b>Description</b>	Type an optional description of the document.
<b>Upload File</b>	Click to upload the file. <ul style="list-style-type: none"> <li>The document is listed in the <b>Document List</b> section.</li> <li>The date-time stamp and user ID display the date and time the document was uploaded and the user ID of the user who uploaded the document.</li> </ul>

Any changes made in the Document Options window are saved when you close the window.

### Other Functions and Features:

<b>Type</b>	Click the link in the <b>Type</b> column to download the file to your computer to view it.
<b>Choose File</b>	Click again to add another document, and repeat the steps for uploading a document.
	Click to delete the document from the record. You are prompted to confirm that you want to delete the document.

#### NOTES

- Deleted documents are not actually deleted from the Document Attachments server. You can retrieve deleted files using the Document Attachments File Recovery utility in District Administration.
- If a user deletes a requisition from the Purchasing > Maintenance > Create/Modify Requisition or Create/Modify Contract Requisition pages, the attached documents are deleted.
- Only users who are approvers can upload documents for a requisition on the Purchasing > Maintenance > Approve Requisition page.
- If a user uses the Purchasing > Utilities > Mass Delete Requisition Records page to delete requisitions, all associated document attachments are deleted.